

# Job Description

**Job title:** Client Services Associate – Full time  
**Reporting to:** Head of Client Services  
**Location:** Daventry, Northamptonshire.

**About the role:** To deliver a professional client service to Connection Capital clients, Investee Companies and Third Party Administrators, ensuring that all necessary administration, client communication and reporting is carried out to a high standard.

**Essential skills:**

- Strong communication skills, both written and oral
- Proficient in the use of Microsoft Word and Excel
- Proficient in the use of Customer Relationship Management (CRM) systems
- Strong and accurate numeracy skills
- Good analytical skills
- Strong organisational skills
- Flexibility
- Pragmatic approach

**Desired skills and knowledge:**

- Awareness of different types of investment structures
- Strong administration background
- Understanding of FCA Regulatory framework
- Previous experience of working in investments or a professional services Company
- Previous experience of working in private equity / private debt / alternative asset funds
- Previous experience of annual accounts and tax returns
- Graduate degree

**Responsibilities:**

- Processing of client documentation in respect of new investments
- Updating all client records and internal systems post completion of an investment
- Processing of AML documentation for new clients and ensuring these records are kept up to date
- Preparation of payment sheets using Excel for client payments. Communicate details of the payment to the clients by email
- Update CRM system with client information and transactions in relation to investment activity

- Regular liaison with a variety of Third Parties including our lawyers, Investee Companies, fund administrators, asset managers and SIPP providers
- Regular liaison and communication with Connection Capital clients, including responding to enquiries in a timely manner
- Involvement in the annual accounts and tax return process. To include checking of the documentation and the information received and issuance to the clients.

**In return, we can offer you:**

- A competitive salary
- Ongoing career development
- Option to WFH 2 days per week (subject to successful probationary period)
- 28 days annual holiday allowance (plus Bank holidays)
- 4x salary death-in-service benefit
- Automatic enrolment into the Connection Capital Workplace Pension (contributory)
- Option to join group private medical insurance scheme
- Eligibility to participate in an annual discretionary bonus

### **To apply for this role**

If you would like to apply for this role, please complete our application form and a member of the team will be in touch with you.